



TRICARE
MANAGEMENT
ACTIVITY

OFFICE OF THE ASSISTANT SECRETARY OF DEFENSE
HEALTH AFFAIRS
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MAR 26 2001

MEMORANDUM FOR SURGEON GENERAL OF THE ARMY
SURGEON GENERAL OF THE NAVY
SURGEON GENERAL OF THE AIR FORCE

SUBJECT: Appointment Standardization Program (APS) Guidance

On May 25, 2000, the Assistant Secretary of Defense, Health Affairs, provided the Services with the authority to proceed with implementation of appointment standardization. This memorandum authorized the use of the nine standard appointment types and directed that all Military Treatment Facilities (MTFs) use these standardized appointment types to book 90 percent of all appointments by 1 October 2001. The Appointment Standardization Integrated Program Team (APS IPT) has made great strides to develop policies, educational programs, technical enhancements to the Composite Health Care System (CHCS), and performance measures. The APS IPT has also initiated contract changes to assist MTFs and our Managed Care Support Contractors (MCSCs) to successfully make this conversion. This memorandum explains what initiatives are underway and what actions are required to fully support the implementation of appointment standardization business practices.

Policies and Business Rules

MTF Commanders' leadership and support for the APS implementation is the most important factor for the success of the program. Appointment standardization requires a large change in the day-to-day business practices of a facility. To assist in this change, Commanders should appoint an Access Manager to lead the effort in APS implementation and support the formation of an Access Management Tiger Team to manage and monitor the smooth transition to APS. The responsibilities of an Access Manager are included in attachment 1.

Educational Requirements/Opportunities

Each MTF Commander is strongly encouraged to start reviewing the guidance provided in the "Commander's Guide to Access Success." This information provides guidance to the MTF's Access Management Tiger Team on what actions to take to fully and successfully implement appointments standardization business practices. The guide can be found at <http://www.tricare.osd.mil/tai/cguide.htm>. Also available on this website are Computer Based Training modules, technical manuals and condensed "Cookbooks" which will serve to further educate staff.

Each MTF Commander should identify at least two personnel to attend the Appointment Standardization Business Rules Training Seminars to be hosted by TMA's APS IPT. Six seminars will be held, each lasting one and one-half days. The seminars are scheduled for April 10-11, April 12-13, May 1-2, May 3-4, May 15-16, and May 17-18, 2001. All six seminars will be held in the Washington, DC area. Each MTF will send their personnel to only one designated regional seminar. Attached is the syllabus (attachment 2), and a list of the required attendees, dates, and points of contact (attachment 3). Other details of this training are available on the

TRICARE Access Imperative Website at <http://www.tricare.osd.mil/tai>. Attendance must be coordinated through your respective TRICARE Region or Service APS IPT members.

CHCS Upgrades

The first CHCS upgrade to support appointment standardization, APS Phase I, was loaded to all CHCS hosts in November 2000. This enhancement provided all MTF's with coded standard appointment types and detail codes. It is planned that the second upgrade, APS Phase II, will be completely released by the end of September 2001. The APS Phase II upgrade is not essential to begin the implementation of appointment standardization. We strongly encourage that all MTFs get started on their conversions once seminar training is completed. We anticipate the entire process to convert both primary care and specialty clinics will take approximately 12 weeks. For guidance on getting started, please refer to the Commander's Guide for Access Success.

Performance Measurement

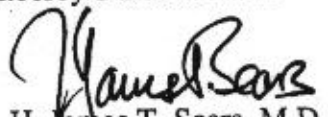
There are many tools available on the TRICARE Operations Center website (<http://www.tricare.osd.mil/tools/>) to assist MTF Commanders in monitoring performance in APS implementation and access improvement, such as the MTF Standard Appointment Type Utilization Report, the MHS Standard Appointment Type Utilization Report, and the Template Analysis Tool (TAT.) These reports focus on the MTF's, TRICARE Region's, and Service's performance in booking 90 percent of their total appointments using one of the nine standard appointment types. These reports are regularly updated on a daily or weekly basis. Commanders should familiarize themselves with these tools and take advantage of their information to assist in conversion efforts.

Contract Initiatives

Changes are being made to the TRICARE Operations Manual (OPM) to reflect the MCSC's requirement to use the APS Methodologies. The OPM changes will direct the MCSCs to follow the procedures in the Commander's Guide to Access Success to book appointments.

Rough Order of Magnitude (ROM) requests are being obtained from the MCSCs to fully estimate the total costs associated with implementing appointment standardization. The tasks to be estimated include implementation of APS methodology business practices, implementation of standard hospital locations in CHCS, the use of new functionality of APS Phase I and II CHCS enhancements, and the training of appointing staffs to use the new APS methodology.

For additional information or clarification, please contact my point of contact, Lieutenant Colonel David J. Corey, Program Manager for Appointment Standardization, at (703) 681-0039 x 3658, DSN: 761-0039, email: david.corey@tma.osd.mil.


H. James T. Sears, M.D.
Executive Director

Attachments:

1. Responsibilities of Access Managers/Appointment Officer
2. Syllabus for Appointment Standardization Business Rules Training Seminar
3. Attendee Registration Information

RESPONSIBILITIES OF ACCESS MANAGERS

The responsibilities of MTF's Access Manager/Appointment Officer will include, but not be limited to, the following:

- Functions as the Commander's agent for appointments standardization, provider and table builds, access measurement and schedule management at the MTF.
- Chairs the MTF's Access Management Tiger Team;
- Assists clinic heads in formulating clinic goals in terms of access, volume, patient demand, staffing, and GME;
- Assesses clinic operations and appointments utilization patterns to identify bottlenecks and to maximize use of available resources;
- Ensures that MCP booking, standardized appointment types, standardized places of care, and standardized detail codes are implemented within the MTF;
- Ensures appointment personnel are appropriately trained on appointment standardization and access improvement initiatives and procedures;
- Ensures clinic leadership is trained on the value and use of performance measurement tools such as canned CHCS reports, Template Analysis Tool, Access to Care Summary Reports, etc.;
- Ensures personnel are designated at the clinic level who are responsible and accountable for appointments standardization, patient access, and provider schedule management;
- Monitors appointment standardization compliance and access metrics for all clinics within the MTF;
- Ensures the MTF-wide dissemination of pertinent MTF and higher headquarters APS and Access Improvement directives;
- Maintains a standardized environment for all APS and ATC data at the MTF and forwards new APS and ATC issues to the Lead Agent for review and assistance;
- Functions as the MTF's point of contact for APS and ATC issues and represents the MTF at related conferences;
- Identifies need for any additional standardized codes, appointment types and places of care and elevates this need to the Lead Agent for approval prior to use at the MTF;
- Interfaces with Lead Agent, Intermediate Command, Service level counterparts to facilitate access improvement and appointment standardization programs.

The knowledge, skills and abilities of the MTF Access Manager/Appointment Officer should include, but not be limited to the following:

- Knowledge of MTF and clinic procedures for scheduling appointments, building CHCS files and tables, and managing provider templates and schedules.

- Knowledge of clinical operating procedures of the various clinics within the MTF.
- Working knowledge of on-going APS and ATC improvement initiatives and the policies that govern them.
- Demonstrates a thorough knowledge of the functionality of CHCS MCP and PAS appointment systems.
- Demonstrates a working knowledge of the correct usage of MEPRS, CPT and ICD codes for the various clinics within the MTF.
- Demonstrates the ability to research, collect and analyze data from multiple sources and provide appropriate managerial recommends to MTF leadership.
- Skilled in identifying problems, solution to problems and implementing those solutions to bring resolution to those problems in accordance with accepted guidance.
- Demonstrates experience of effectively communicating orally and in writing to higher headquarters, MTF leadership, and clinic heads.
- Demonstrates an awareness and appreciation for the duties and responsibilities of the MTF's appointing personnel.

SEMINAR SYLLABUS

Seminar Description: Each seminar will require a day and a half and be comprised of the eight courses described below. The optimum class size will be 40-55 participants for each CONUS course. Training will be lecture with question and answers. MTF and Managed Care Support Contractor participants will attend classes according to their job description or per site recommendation. Each MTF and MCSC are allowed to send two personnel for their designated seminar.

1. Course: Appointment Standardization Executive Overview (45 minutes) (Day 1)

Course Contents: A high-level briefing covering the Appointments Standardization objectives and benefits, the imperatives of access standards, a review of the "as-is" model, a description of the "to be" model, directions on how to prepare for Appointments Standardization, implementation steps and considerations, and information on tools and techniques available to measure success. A discussion of MHS future initiatives such as Web Appointing will also be covered.

2. Course: Provider Overview (45 minutes) (Day 1)

Course Contents: A high-level briefing covering the Appointment Standardization objectives and benefits, the imperatives of access standards, the improvements to the appointments process, a review of the impact on providers in the areas of scheduling and booking, a summary of the new business rules, a discussion of the measurement capabilities and tools available to determine success and to allow more accurate schedule planning/analysis, and instructions on preparation for implementation of MCP and Appointment Standardization. Training tools and sources will also be presented.

3. Course: Measurement Tools (45 minutes) (Day 1)

Course Contents: A technical briefing covering appointments standardization measurement capabilities, including tools available to determine improved performance and to allow more accurate schedule planning/analysis. Discussion will include measurement at the executive, decision support, and MTF operational levels. External sources of information will also be provided.

4. Course: Access to Care Measurement Business Rules (45 Minutes-day 1)

Course Contents: A business process overview of the techniques to collect accurate Access to Care data. This block of instruction will enable leadership at all levels to be familiar with possible problem areas and solutions to these problems of collecting accurate Access To Care data. Appropriate education strategies of appointments personnel, reporting methods, data interpretation and measurement of MTF performance to meet access standards for acute, routine, wellness and specialty care will be discussed. Upon completion of instruction attendees will be able to train staff to accurately use ATC in CHCS, understand the importance of the type of data and recognize and correct problems arising from the collection of this type of data.

5. Course: Lessons Learned (45 minutes) (Day 1)

Course Contents: A briefing by a representative from a site describing their actual implementation procedures, lessons learned, benefits, and issues with Appointments Standardization.

6. Course: Open Access (45 minutes) (Day 1)

Course Contents: A briefing by a representative from a site that is implementing Open Access as a booking model. The presentation will explain the Open Access model, and the implementation procedures, benefits, and problems encountered.

7. Course: Appointments Standardization Operational Overview (4 hours) (Day 2)

Course Contents: A detailed technical briefing covering the Appointment Standardization objectives and benefits, the imperatives of access standards, the improvements to the appointment process, a review of the impact on scheduling and booking clerks, guidance for dental and ancillary booking, a summary of the new business rules, a discussion of the measurement capabilities and tools available to determine success and to allow more accurate schedule planning/analysis, and direction on preparation for the use of MCP and implementation of Appointments Standardization. Training tools, capabilities and help sources will also be presented.

8. Course: Regional Issues (Content and Length To Be Determined By the TRICARE Regional Access Manager)(Day 2)

ATTENDEE REGISTRATION INFORMATION

Prospective attendees must coordinate their attendance through their TRICARE Regional/Service POC to be considered for attendance. Seminar Location: Ramada Plaza Hotel - Pentagon, 4641 Kenmore Avenue, Alexandria, VA 22304. Phone: (703) 751-4510

Seminar Dates by Regions:

<u>Dates of Training:</u>	<u>Region(s) Attending:</u>	<u>Contact Regional/Service POC</u>
		NLT:
April 10-11	2, 5, 15	2 April
April 12-13	1	5 April
May 1-2	6	24 April
May 3-4	Central	26 April
May 15-16	9, 10, 11	8 May
May 17-18	3, 4	10 May

TRICARE Health Service Region Access Manager/Service POCs for Registration:

<u>Region</u>	<u>Name</u>	<u>Telephone</u>	<u>DSN</u>	<u>FAX</u>	<u>Email</u>
1	CAPT Steve Remmenga	202-356-0827	624-0797	202 782-5450	remmengas@reg1.tricare.amedd.army.mil
2	Maj Shomela Labee	757 314-6044	565-0386	757 314-6481	shomela.labee@mh.tma.med.navy.mil
15	LT Harry Caulton	706 787-8010	773-8010	706 787-3024	harry.caulton@se.amedd.army.mil
4	Capt Gavin Mason	228-377-4821	597-4821	228 377-7870	Gavin.mason@keesler.af.mil
5	COL Patricia Kinder	937 904-5018	674-5018	937 656-7520	patricia.kinder@wpafb.af.mil
6	Maj Mark Ellis	210 292-3207	554-3207	210 292-3222	mark.ellis@tricaresw.af.mil
Central	Ms. Kitty West	719 524-2616	883-2616	719 524-2655	Kitty.west@tricare.carson.army.mil
9	LT Lorna Dennison	619 532-6174	522-6174	619 532-7172	Ldennison@reg9.med.navy.mil
10	LtCol Brij Sandill	707 424-6558	350-6558	707 424-6508	Brij.sandill@travis.af.mil
11	CAPT Charlie Taylor	253 968-3429	782-3429	253 968-3474	Charles.Taylor@nw.amedd.army.mil
Army	Ms. Jan Leaders	210 221-7106	471-7106	210 221-7043	Jan.leaders@amedd.army.mil
Navy	CDR Chip Taylor	202 762-3116	762-3134	202 762-3743	Hataylor@us.med.navy.mil
Air Force	Ms. Cindy Pierson	210 536-4080	536-4080	210 536-4080	Cindy.pierson@brooks.af.mil
TMA	LTC David Corey	703 681-0039 ext. 3658	761-0039	703 681-0947	david.corey@tma.osd.mil